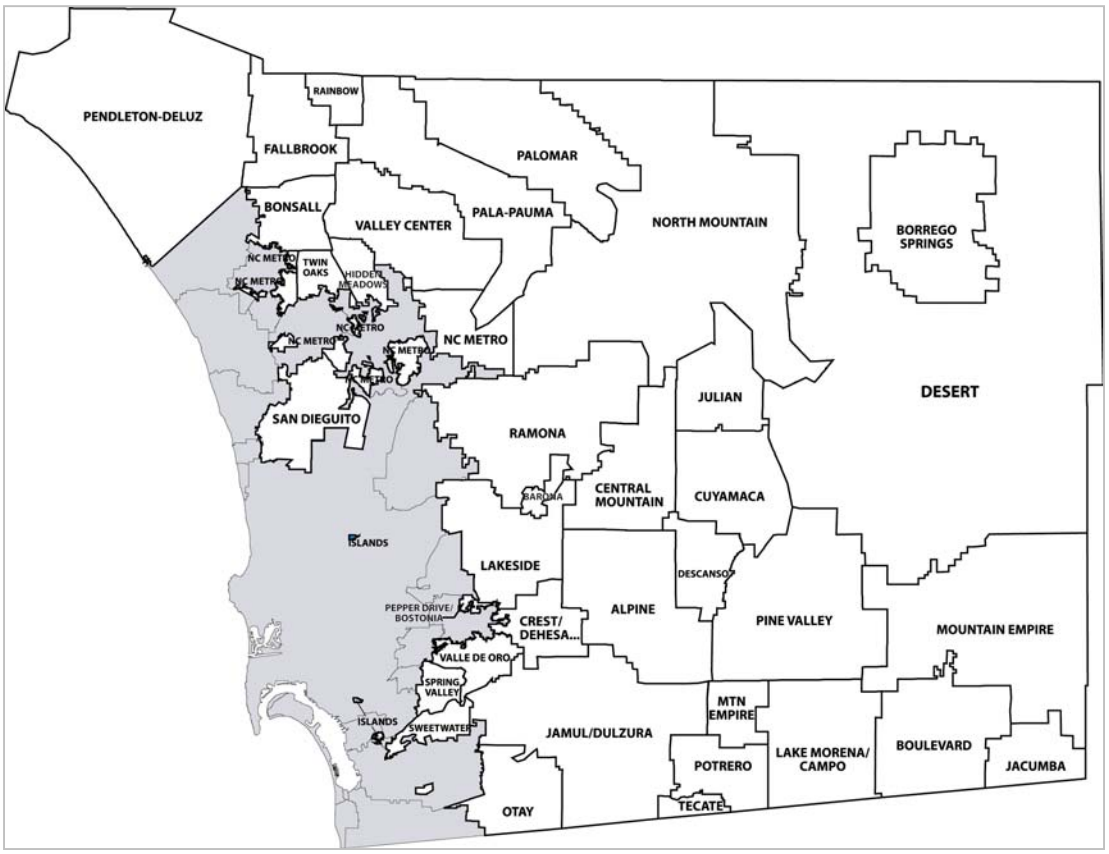

GP2020
POPULATION ANALYSIS

This section provides information on the GP2020 population forecasts per community, as well as an explanation of the model utilized to calculate these projections.

► Forecasts and Models

GENERAL PLAN 2020 Population Summary

Community Planning Area (CPA)	Planning or Sponsor Group Subarea	Existing Population (2000 Census)[1]	Planning/ Sponsor Group Target[2]	Working Copy - December 2002
Alpine		16,681	27,369	30,200
Barona		536	---	550
Bonsall		8,864	17,217	13,850
Central Mountain	Balance	7*	---	150
	CUYAMACA	377*	680	600
	DESCANSO	1,742*	2,274	2,800
	PINE VALLEY	2,329*	3,613	2,700
	Total	*4,455*	*6,567*	*6,250*
County Islands		1,986	2,130	3,150
Crest/Dehesa/Granite Hills/Harbison Canyon		9,426	12,000	11,000
Desert	Balance	608*	2,079	1,400
	BORREGO SPRINGS	2,582*	35,792*	13,750
	Total	*3,190*	*37,871*	*15,150*
Fallbrook		39,585	50,000	62,150
Jamul-Dulzura		9,208	18,641	22,550
Julian		3,104	3,100	4,200
Lakeside		72,370	85,754	87,400
Mountain Empire	Balance	101*	361	250
	BOULEVARD	1,513*	3,000*	2,850
	JACUMBA	660*	1,415*	3,400
	LAKE MORENA/CAMPO	2,679*	6,500*	5,000
	POTRERO	886*	717*	2,150
	TECATE	156*	2,150*	450
	Total	*5,995*	*14,143*	*14,100*
North County Metro	Balance	28,914*	52,967	64,400
	HIDDEN MEADOWS	6,329*	10,000	11,650
	TWIN OAKS	2,501*	2,142	3,750
	Total	*37,744*	*65,109*	*79,800*
North Mountain	Balance	2,467*	3,779	5,250
North Mountain	PALOMAR MOUNTAIN	245*	871	500
North Mountain	*Total*	*2,712*	*4,650*	*5,750*
Otay		6,804	17,554	16,150
Pala-Pauma		6,156	7,000	12,750
Pendleton-De Luz		36,927	34,976	38,350
Rainbow		1,843	2,800	3,500
Ramona		33,407	52,043	53,500
San Dieguito		12,527	37,506	34,050
Spring Valley		59,324	69,292	67,700
Sweetwater		12,951	16,303	15,250
Valle De Oro		40,035	45,706	42,850
Valley Center		15,639	33,000*	38,300
TOTALS:		**442,919**	**660,731**	**678,500**

[1] *subareas (marked with a *) do not include group quarters*

[2] *endorsed by the Board of Supervisors, April 1998. Targets marked with a * not yet endorsed by the Board: Borrego: 12,000; Boulevard: 4,134; Potrero: 1,525; Valley Center: 45,853; Tecate: 1,000; Jacumba: 5,000; Lake Morena: 4,640;* ***Total = 652,909***

Note: The Community Targets were established before the 2000 Census data was available.

POPULATION FORECAST

The proposed regional Land Use Distribution map produces the following population capacity for the year 2020:

Existing Population (2000 Census):	442,919
2020 Population Target	660,000
Working Copy (December 2002)	678,500
Potential Increase:	235,581 (53%)

A detailed breakdown of population results for each community and sponsor group planning area can be found on the following pages. This table shows that some communities located within the County Water Authority (CWA) boundary will not experience substantial change before 2020 because they are largely built out or because much of their undeveloped land is highly constrained. The potential for future growth is highest in those communities within the CWA that are not fully developed and where land is not highly constrained.

Three types of analysis were used to determine whether the Working Copy Map accommodates future population growth.

Population Model

To ensure that the Working Copy Map accommodated population predictions, the County utilized a population forecast model to simulate future development and growth. A population forecast model is a complex computer program that utilizes Geographic Information System data to approximate actual development constraints. This type of computer model is commonly used by regional councils of government, such as SANDAG, to forecast future population growth at a general plan level. As a predictive tool for the general plan, the model's evaluation is performed at a regional level and does not provide project-level analysis.

Often development is not able to realize the full yield permitted by the density assigned to property. For example, the yield for development in ground-water dependant areas may be reduced by county ordinances. In order to make its forecast as accurate as possible, the County has refined the SANDAG model to analyze twenty-four different types of development constraints. These constraints are applied to a database consisting of SANDAG land use data and the County's proposed land use designations.

The model calculates the acreage within each proposed density designation and then reduces the land available for development by applicable constraint. For example, when land use designations in the Semi-Rural regional category were applied to areas with steep (over 25%) or very steep (over 50%) slopes, the model reduced potential yield according to the formula now applied by the County's Resource Protection Ordinance (RPO). Some of the development constraints analyzed by the County's model include steep slopes, floodplains, habitat, ground water, currently developed land, and the Forest

Conservation Initiative. The model predicts that 85,570 future dwelling units could be built with the proposed land use distribution. The entire list of constraints can be found on the following pages.

Available Vacant Land Analysis

The ability of the Working Copy land use map to accommodate future growth is related to its ability to provide enough land for future development. The population capacity of the Working Copy Map is based on a forecast of 85,570 future dwelling units. The potential population is higher than the County target. However, concern exists within the development community that the proposed map does not permit enough density on vacant land to produce the necessary future units. This concern is based on the possibility that other factors may constrain development and reduce yield on a project-by-project basis. Such factors would result in the development of fewer dwelling units than the number forecasted by the model.

The County performed an analysis of vacant land and the number of dwelling units that could be supported by that land, based on the density designations assigned by the Working Copy Map. The land use data was provided by SANDAG. The analysis found a total of 630,500 acres of privately held vacant land within the unincorporated county. It then determined how much vacant acreage occurred within each density designation and whether the land was east or west of the CWA boundary.

Next, the analysis multiplied the vacant acres within each designation by the corresponding density to determine an approximate development yield without any constraints. Then staff compared the non-constrained yield with the model's constrained yield. This comparison gave an estimate of the percentage of vacant land within each designation that could be developed. The results revealed that the percentage of constrained yield varied significantly between the regional categories. For example, west of the CWA, semi-rural lands (with the exception of one dwelling unit per ten acres) averaged a yield of only 39% of potential while rural lands east of the CWA averaged a yield of 89% of potential.

These findings corroborate information from the development community indicating that potential yield in semi-rural designations is highly constrained. However the findings also show that the model's prediction of 85,570 dwelling units has taken this increased percentage of constraint into account and that there is enough available vacant land with development potential to accommodate the forecast

Building Permit Trends Analysis

The County performed an analysis of the number and type of building permits issued from 1990 through 2001. The analysis revealed that, over this twelve-year period, the annual number of permits issued for construction of new dwellings averaged 2,750. A copy of this analysis can be found on the following pages.

The County's population model has estimated that the Working Copy map will support an additional 85,571 future dwelling units. This forecast is a conservative estimate that has already taken building constraints into consideration. Whether the plan's capacity is sufficient to meet the future needs of the county's growing population will be affected by the rate at which building permits are requested.

If building continues at the current rate, the plan provides enough capacity for the next thirty-one years. However, an accelerated growth rate could increase the annual number of building permits issued by the county. If the average rate should increase by an additional 20% to 3,300 annual permits, the proposed plan would support construction of new dwellings for nearly twenty-six more years.

Even if development is not built to its full potential, the Working Copy should provide sufficient capacity to provide enough housing supply to last through the planning period. Should actual development only reach 75% of the plan's forecasted capacity, for example, it still provides enough supply to last for the next twenty-three years under the current rate of construction.

Unless there is a significant increase in the number of building permits issued for new residential units, the Working Copy map should provide a sufficient number of future dwelling units to support the unincorporated county's predicted population growth.

Conclusion

These analyses appear to confirm that the proposed land use map will allow for an adequate number of dwelling units to meet the projected population.

BUILDING PERMIT ANALYSIS 1990 - 2001

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	TOTAL
Ramona	291	193	206	193	313	291	263	252	347	690	582	524	4145
Fallbrook	348	196	169	116	121	125	231	285	490	729	580	512	3902
San Dieguito	197	107	71	48	106	132	180	288	350	556	591	773	3399
Valley Center	178	134	164	102	117	137	170	188	306	397	367	345	2605
N. County Metro	248	135	95	67	61	78	101	98	161	323	392	371	2130
Lakeside	123	100	125	125	142	122	175	320	244	174	196	197	2043
Alpine	198	118	114	79	150	106	79	92	196	275	149	125	1681
Valle de Oro	113	80	45	33	79	99	108	98	67	210	151	228	1311
Spring Valley	139	123	109	71	56	24	51	88	66	199	212	143	1281
Jamul-Dulzura	133	70	70	46	55	60	49	63	89	160	143	125	1063
Bonsall	96	45	30	27	28	27	61	37	71	127	104	166	819
Desert	104	90	90	72	75	27	34	21	94	44	32	52	735
Crest-Dehesa	89	88	56	52	48	33	22	44	64	49	81	78	704
Mountain Empire	83	35	80	34	59	50	40	37	33	55	53	73	632
Central Mountain	58	62	30	28	25	27	28	21	36	57	62	47	481
Julian	57	46	22	26	32	23	13	35	33	36	61	49	433
Pala-Pauma	43	36	14	10	14	17	9	16	14	18	60	61	312
North Mountain	19	19	33	15	21	26	21	19	22	36	44	35	310
Rainbow	37	30	20	13	16	5	4	4	19	14	17	8	187
Pepper Drive-Bostonia	23	5	32	7	4	6	2	3	15	4	14	60	175
Pendleton-De Luz	16	10	16	11	7	11	8	11	13	23	13	27	166
Sweetwater	13	11	10	5	2	5	9	4	5	8	12	3	87
County Islands	2	8	9	2		2		3	3	2	3	4	38
Community TOTAL	2608	1741	1610	1182	1531	1433	1658	2027	2738	4186	3919	4006	28639
Permits Counted Without an Assigned Location*	819	297	317	227	234	243	211	214	344	476	503	469	4354
TOTAL	**3427**	**2038**	**1927**	**1409**	**1765**	**1676**	**1869**	**2241**	**3082**	**4662**	**4422**	**4475**	**32993**

Average total per year = 2750

* One or more of the following factors are not currently available on the tracking system: Zip Code/Census tract, APN, or Planning Group. Therefore, a planning area was not assigned.

4/14/2002